

Schedule 16 - Administrative Management Records

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Introduction

This schedule provides for the disposition of records relating to administrative management activities, excluding records of operating personnel, budget, accounting, and printing functions, which are covered by other records schedules. Included within the scope of the schedule are disposable records created in the course of organizational planning, development, and simplification of procedures; records management activities; and administration of management improvement programs. Schedule 1 (items 12 and 13) provide for the disposition of case files on individuals involved in incentive award and similar types of management improvement programs. Any records created prior to January 1, 1939, must be offered to the National Archives and Records Administration (NARA) for appraisal before applying these disposition instructions.

The organizational locations and titles of administrative management units vary from agency to agency. They may be scattered at numerous levels or locations, or may be centralized. For the purposes of this schedule, the nomenclature standards set forth by the Senate Committee on Government Operation in Senate Report No. 245, 80th Congress, 1st session, are followed: the first organizational level within an agency is the bureau level; subordinate components are, successively, division, branch, section, and unit.

This schedule is based on the presumption that management activities are carried on by a specialized person or unit with, at least, divisionwide and usually bureauwide or agencywide responsibilities or by a group of such persons or units in an agency, although its provisions are applicable to exactly comparable records of agencies without such formal assignments of responsibility. Many similar or comparable records created at lower organizational levels or in field offices vary so greatly in content, value, and arrangement that they are not covered by this schedule.

The nature of the activities documented by administrative management records, necessitated a relatively large proportion of them to be of continuing value. Files with archival value are covered by all or parts of Items 1, 8, and 15-20 of this schedule. Related temporary or ephemeral materials include working papers that do not have a direct bearing on the transaction, intermediate drafts of documents and worksheets that do not represent significant basic steps in the preparation of final drafts, letters or memoranda of transmittal and acknowledgment, routing slips, and extra copies of documents.

A new item has been added to this schedule to authorize the destruction of electronic mail and word processing records maintained by the BLM in addition to the copy in the recordkeeping system. This item covers electronic copies of electronic mail and word processing records created and used solely to produce the recordkeeping copy, and electronic copies of electronic mail and word processing records that are needed in addition to the recordkeeping copy for dissemination, revision, or updating.

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Item	Record Series Description	Disposition Authority
1	DIRECTIVES FILES [1221]. The BLM directives system is comprised of both temporary and permanent directives. Temporary directives consist of Instruction Memorandums, Information Bulletins, and Program Notes which are in effect for a short period of time. The BLM manual system is a permanent record of written policy and procedural instructions consisting of directives indexes (DDBs), manual sections, manual supplements, handbooks, and handbook supplements. Authority: 41 CFR 201. Forms: BLM 1220-1, 2; 1221-1, 2, 4, 8, 9, 9A-B, 12, 13, 17. Confidentiality: Non-public record category 3. Exclusions: BLM manual distribution change requests (Schedule 13/4) and reference copies of directives (Schedule 23/21). Location: All.	
	a. Directives Masters. Case files containing one copy of each directive with the related clearance sheet. Maintained by the individual or staff responsible for directives control and distribution in the originating office.	PERMANENT. Cutoff EOFY in which issued. Transfer to FRC 2 years after cutoff. FRC transfers to NARA in 5-year blocks when most recent records are 20 years old (e.g., transfer FY80-84 block in FY2005). NARA Job NC1-49-94-2, 16/1a.
	b. Directives Case Files.	
	(1) Administrative Directives Case Files. Documenting aspects of the development of a BLM administrative program directive related to routine administrative functions (e.g., payroll, procurement, personnel, property, vehicles, budget, forms, reports, mail, printing, uniforms, etc). Maintained by the originating office.	TEMPORARY. Destroy when issuance is superseded, canceled, or no longer needed for reference. NARA Job NC1-49-90-3, 16/1b.
	(2) Mission-Related Directives Case Files. Documenting aspects of the development of a BLM mission-related program directive (e.g., lands, minerals, range, forestry, wildlife, soil-water-air, recreation, resource protection). May include documents described in Schedule 16/20. Maintained by the originating office.	PERMANENT. Cutoff EOFY. Transfer to FRC 10 years after cutoff. FRC transfers to NARA 30 years after cutoff. NARA Job NC1-49-94-2, 16/1b(2).
	c. Directives Index Data Base. A data base that provides an index to numbered BLM temporary directives (instruction memorandums and information bulletins). The data base is used to locate sources of the BLM policy and information issued via the formal directives system. Exclusions: input/source records (Schedule 20/2), security backup tapes (Schedule 20/8), software (Schedule 20/10). Location: WO, Centers, SO.	Delete after the expiration date of the related instruction memorandum or information bulletin or when no longer needed, whichever is later. GRS 20/3.

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Item	Record Series Description		Disposition Authority
2	RECORDS DISPOSITION FILES [1220]. Descriptive inventories, disposal authorizations, schedules, and reports. Includes records inventory project files. Forms: SF-115, 115a, 135, 135a, 258; DI-1904, 1905, and related documentation. Confidentiality: Non-public record category 3. Location: All. Note: Although this item has a temporary retention, it is suggested all documents under item a be kept indefinitely for reference purposes.		
	a.	Records Disposition Program Basic Documentation. Basic documentation of records description and disposition programs, such as SF-115s, Request for Disposition Authority; SF-135 and SF-135a, Records Transmittal and Receipt; SF-258, Agreement to Transfer Records to National Archives of the United States; and related documents. Related documents include shelf lists, notices of location changes, notices of intent to destroy, and destruction notices.	
		(1) SF-115s that have been Approved by NARA.	TEMPORARY. Destroy 2 years after supersession. GRS 16/2a(1). See Note in item 2 series description above.
		(2) Other records.	TEMPORARY. Destroy 6 years after the related records are destroyed or after the related records are transferred to the National Archives of the United States, whichever is applicable. GRS 16/2a(2). See Note in item 2 series description above.
	b.	Records Disposition Program Routine Correspondence and Memoranda.	TEMPORARY. Destroy when 2 years old. GRS 16/2b.
3	FORMS FILES [1223]. Maintained by office issuing the form. Forms: SF-83, 152, 360; OF-13, 13a, 13b, 13c; BLM 1223-7. Confidentiality: Non-public record category 3. Location: All.		
	a.	Forms Masters. One copy of each form created by the BLM with related instructions and documentation showing the inception, scope, and purpose of the form.	TEMPORARY. Destroy 5 years after related form is discontinued, superseded, or canceled. GRS 16/3a.
	b.	Forms Background Materials, Requisitions, Specifications, processing data, registers, and control files.	TEMPORARY. Destroy when related forms are discontinued, superseded, or canceled. GRS 16/3b.

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Item	Record Series Description		Disposition Authority
4	RECORDS HOLDINGS FILES [1220]. Statistical reports of agency holdings, including feeder reports from all offices and data on the volume of records disposed of by destruction or transfer. Forms: SF-203. Confidentiality: Nonpublic record category 3. Location: All.		
	a.	Records Held by Offices that Prepare Reports on Agencywide Records Holdings.	TEMPORARY. Destroy when 3 years old. GRS 16/4a.
	b.	Records Held by Other Offices.	TEMPORARY. Destroy when 1 year old. GRS 16/4b.
5	ADMINISTRATIVE MANAGEMENT PROJECT CONTROL FILES [1200]. Memoranda, reports, and other records documenting assignments, progress, and completion of projects. Confidentiality: Non-public record category 3. Location: All. Exclusions: Administrative and management improvement plans/surveys/studies/projects (Schedule 16/19).		TEMPORARY. Destroy 1 year after the year in which the project is closed. GRS 16/5.
6	REPORTS CONTROL FILES [1222]. Case files maintained for each BLM report created or proposed, including public use reports. Included are clearance forms, copies of pertinent forms or descriptions of format; copies of authorizing directives; preparation instructions; and documents re. the evaluation, continuation, revision, and discontinuance of reporting requirements. Forms: SF-83; OF-101; OMB 83. Confidentiality: Non-public record category 3. Location: WO.		TEMPORARY. Destroy 2 years after the report is discontinued. GRS 16/6.
7	RECORDS MANAGEMENT GENERAL FILES [1220]. Correspondence, reports, authorizations, and other records re. the management of the BLM records, including such matters as forms, correspondence, reports, mail, and files management; the use of microforms, ADP systems, and word processing; records management surveys; vital records programs; and all other aspects of records management not covered elsewhere in this schedule. Confidentiality: Non-public record category 3. Location: All. Exclusions: Records inventory project files (Schedule 16/2).		TEMPORARY. Destroy when 6 years old. GRS 16/7.
8	COMMITTEE AND CONFERENCE FILES [1230]. Authority: 86 Stat. 770; 43 CFR 1784. Confidentiality: Non-public record category 3; Privacy Act System Interior/OS-68. Location: All. Exclusions: EEO committees (Schedule 1/25g), non-committee groups (Schedule 16/19), records created to comply with the provisions of the Government in the Sunshine Act (submit SF-115 to NARA).		
	a.	Internal Committee Files Re. Establishment, Organization, Membership, and Policy.	TEMPORARY. Destroy 2 years after termination of committee. GRS 16/8a.
	b.	Records Created by Internal Committees.	

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Item	Record Series Description			Disposition Authority
		(1)	Committee Agendas, Minutes, Final Reports and related records documenting the accomplishments of official boards and committees. Exclusions: Those maintained by the sponsor or Secretariat.	TEMPORARY. Destroy when 3 years old. GRS 16/8b(1).
		(2)	Committee Records - Other.	TEMPORARY. Destroy when 3 years old. GRS 16/8b(2).
	c.	Records Maintained by Agency Committee Management Officers for Committees Established Under the Federal Advisory Committee Act. Including copies of charters, membership lists, agendas, meeting notes, policy statements, and material required to be available for public information. Forms: SF-248, 248a, 249, 249a, 250.		TEMPORARY. Destroy 5 years after termination committee. GRS 16/8c.
	d.	Interagency or Advisory Committee Files.		
		(1)	Interagency or Advisory Committee Case Files. Maintained by the office of committee origin. Consists of records re. committee establishment, organization, membership, and policy and records created by the committee, such as agendas, minutes, and final reports. Exclusions: Records relating to committee evaluations (Schedule 22/2).	PERMANENT. Cutoff EOFY. Transfer to FRC 3 years after cutoff. FRC transfers to NARA in 5-year blocks when most recent records are 13 years old (e.g., transfer 1980-1984 in 1998). NARA Job NC1-49-85-2, 16/12a(1) and 12b(1).
		(2)	Interagency or Advisory Committee Files - Other.	TEMPORARY. Destroy when 3 years old. GRS 16/8b(2).
9	INFORMATION RESOURCES MANAGEMENT (IRM) FEASIBILITY STUDIES [1280]. Studies conducted before the installation of any technology or equipment associated with information management systems, such as word processing, copiers, micrographics, and communications. Studies and system analyses for the initial establishment and major changes of these systems. Such studies typically include a consideration of the alternatives of the proposed system and cost/benefit analysis, including an analysis of the improved efficiency and effectiveness to be expected from the proposed system. Confidentiality: Non-public record category 3. Location: All.			TEMPORARY. Destroy 5 years after completion or cancellation of study. GRS 16/9.
10	MICROFORM INSPECTION FILES [1276]. Documenting the inspection of microform records, as required by 36 CFR 1230. Confidentiality: Non- public record category 3. Location: WO, Centers, SO.			
	a.	Microform Inspection Inventories, Logs, and Reports for Permanent Records. Exclusions: copy of logs and reports attached to the SF-135 or SF-258 (Schedule 16/2), inspection records for unscheduled records (submit SF-115 to NARA).		TEMPORARY. Destroy 1 year after the records are transferred to NARA. GRS 16/10a.

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Item	Record Series Description		Disposition Authority
	b.	Microform Inspection Inventories, Logs, and Reports for Temporary Records.	TEMPORARY. Destroy when 2 years old or when superseded, whichever is later. GRS 16/10b.
11	IRM TRIENNIAL REVIEW FILES [1282]. Reports required by GSA concerning reviews of IRM practices. Included are associated correspondence, studies, directives, feeder reports, and monitoring surveys and reports. Confidentiality: Non-public record category 3. Location: WO.		TEMPORARY. Destroy when 7 years old. GRS 16/11.
12	INFORMATION COLLECTION BUDGET (ICB) FILES [1222]. Reports required by OMB under the Paperwork Reduction Act about the number of hours the public spends fulfilling the BLM reporting requirements. Included are associated feeder reports, report exhibits, correspondence, directives, and statistical compilations. Confidentiality: Non-public record category 3. Location: WO, Centers, SO.		TEMPORARY. Destroy when 7 years old. GRS 16/12.
13	FEDERAL REGISTER DOCUMENTS [1760]. Confidentiality: Non-public record category 3. Location: All. Exclusions: reference copies (Schedule 23/21), files documenting the development, clearance, and processing of proposed and final rules for publication in the Federal Register (Schedule 16/15).		
	a.	Federal Register Meeting Announcement Notices. Files documenting the processing of notices announcing committee meetings, including meetings open to the public under the Government in the Sunshine Act (5 USC 552b(e)(3); hearings and investigations; filing of petitions and applications; issuance or revocation of a license; grant application deadlines, the availability of certain environmental impact statements; delegations of authority; and other matters that are not codified in the CFR.	TEMPORARY. Destroy when 1 year old. GRS 16/13a.
	b.	Federal Register Semiannual Regulatory Agenda Notices.	TEMPORARY. Destroy when 2 years old. GRS 16/13b.
14	MANAGEMENT CONTROL RECORDS. Records created in accordance with OMB Circular A-123, Management Accountability and Control Systems, and P.L. 97-255, the Federal Managers' Financial Integrity Act. Under these authorities, federal agencies are required to perform evaluations of their accounting and administrative controls to prevent waste, fraud, and mismanagement. Confidentiality: Non-public record category 3.		
	a.	Management Control Policy, Procedures and Guidance. Copies of internal directives maintained by the BLM's internal control staff (but not those copies maintained in the agency's official file of internal directives); external directives such as OMB Circular A-123; and correspondence outlining policy and procedure for performing management reviews. Location: WO, Centers, SO.	TEMPORARY. Destroy when superseded. GRS 16/14a.

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Item	Record Series Description		Disposition Authority
	b.	Management Control Plans. Comprehensive plans documenting the agency's efforts to ensure compliance with OMB Circular A-123. Location: WO, Centers, SO.	TEMPORARY. Destroy when superseded. GRS 16/14b.
	c.	Risk Analyses. Reports and supporting materials used to document review of program areas for susceptibility to loss or unauthorized use of resources, errors in reports and information, and illegal and unethical actions. Location: WO, Centers, SO.	TEMPORARY. Cutoff closed files annually. Destroy after next review cycle. GRS 16/14c.
	d.	Annual Reports and Assurance Statements. Created by organizational components below the agency (department or independent agency) level, and compiled by the agency into a single unified report for direct submission to the President and Congress. Location: WO.	TEMPORARY. Cutoff closed files annually. Destroy after next reporting cycle. GRS 16/14d.
	e.	Tracking Files. Files used to ensure the completion and timeliness of submission of feeder reports, including schedules of evaluations, interim reporting, lists of units required to report, and correspondence re. performance of the reviews. Location: WO, Centers, SO.	TEMPORARY. Destroy 1 year after report is completed. GRS 16/14e.
	f.	Review Files. Correspondence, reports, action copies of audit findings, and other records that identify program internal control weaknesses, and corrective actions taken to resolve such problems. Since A- 123 provides for alternative internal control reviews under OMB Circulars A-76, A-127, or A-130, this item also applies to copies of these reviews provided they are identified as alternative reviews in the management control plan. Note: Alternative reviews such as computer security reviews and management and consultant studies may need to be kept longer than provided in this item. This item applies only to copies maintained as internal reviews.	
		(1) Review Files maintained by Office with Responsibility for Coordinating Internal Control Functions. Location: WO.	TEMPORARY. Cutoff when no further corrective action is necessary. Destroy 5 years after cutoff. GRS 16/14f(1).
		(2) Review Files - Copies Maintained by Other Offices as Internal Reviews. Location: WO, Centers, SO.	TEMPORARY. Cutoff when no further corrective action is necessary. Destroy 1 year after cutoff. GRS 16/14f(2).
15	LEGISLATION AND REGULATION PROPOSAL FILES [1750/1760]. Authority: 135 DM 2; 461 DM 1-3; 200 DM 1.5; 210 DM 1.1. Confidentiality: Nonpublic record category 3.		

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Item	Record Series Description	Disposition Authority
	a. Legislation or Regulation Proposal Case Files. Maintained by Headquarters Office of Legislation and Regulatory Management. Consists of legislative and regulatory proposals that affect the BLM, review comments, analyses, recommendations, and related documents. Location: WO.	PERMANENT. Cutoff end of each session of Congress. Transfer to FRC 2 years after cutoff. FRC transfers to NARA in 6-year blocks when most recent records are 13 years old (e.g., transfer 1981- 1986 in 2000). NARA Job NC1-49-85-2, 21a.
	b. Legislation and Regulation Reference Copies. Location: All.	TEMPORARY. Cutoff EOFY. Destroy 2 years after cutoff or when no longer needed for reference. NARA Job NC1-49-85-2, 21b.
16	MEMORANDA OF UNDERSTANDING (MOU) FILES [1786]. Documenting the relationships between BLM and other parties for purposes of mutual assistance activities, in which no obligation or exchange of federal funds, products, or services is involved. Includes documentation for MOU instruments, cooperative management agreements, sustained yield agreements, and National Level or International Agreements. Authority: Various; see BLM Manual 1786.03 for listing. Confidentiality: Non-public record category 3. Location: All. Exclusions: Cooperative assistance agreements (Schedule 3/3), range improvement agreements (Schedule 17/21), nondisclosure agreements (Schedule 18/25).	
	a. MOU Masters. Case files maintained by the office having signatory authority for the instrument.	PERMANENT. Cutoff EOFY in which the instrument is terminated or canceled. Transfer to FRC when 1 year old. FRC transfers to NARA in 5-year blocks when most recent records are 10 years old (e.g., transfer 1980-84 block in 1995). NARA Job NC1-49-85-2, 16/22a.
	b. MOU Reference Copies.	TEMPORARY. Cutoff EOFY in which instrument is terminated or canceled. Destroy 1 year after cutoff or when no longer needed. NARA Job NC1-49-85-2, 16/22b.
	c. MOU Index.	PERMANENT. Transfer with the related MOU masters. NARA Job N1-49-90-3, 16/22c.

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Item	Record Series Description		Disposition Authority
17	PUBLICATIONS BY BLM [1550]. Published reports, books, pamphlets, booklets, brochures, and other BLM publications (or the last manuscript report if not published). Consists of BLM technical notes, Public Land Statistics, and other BLM published scientific and technical reports and releases not described elsewhere. Authority: Title 44 U.S. Code; DM 314. Forms: BLM 1165-22, 36, 60, 61, 63-73. Confidentiality: Non-public record category 3. Location: All. Exclusions: Reference copies of publications (Schedule 23/21), printing project or job files (Schedule 13/2), BLM directives masters (Schedule 16/1), published maps (Schedule 17/1d), resources inventories, studies, and surveys (4/18).		
	a.	Publications Masters. One record copy from the originating office of each published report, book, pamphlet, booklet, brochure, technical note, or other BLM publication.	PERMANENT. Cutoff EOFY in which issued. Transfer to FRC in 5-year blocks when the most recent records are 5 years old (e.g., transfer FY90-94 block in FY2000). FRC transfers to NARA when most recent records are 10 years old. NARA Job NC1-49-85-2, 16/2.
	b.	Publications Case Files. Related to (a) above which document aspects of the development of the publication.	TEMPORARY. Destroy when no longer needed for reference. NARA Job N1-49-90-3, 16/31b.
18	ORGANIZATION AND HISTORY FILES [1210/1701]. Authority: Various; see BLM Manual 1211.03 for listing. Confidentiality: Non-public record category 3. Exclusions: BLM history publications (Schedule 16/17).		
	a.	Organization Charts, Boundary Location Files, and Reorganization Studies.	
		(1) Organization, Reorganization, and Boundary Location Case Files. Providing graphic illustrations and detailed descriptions of the arrangement and administrative structure of functional units of the BLM. Reorganization studies are conducted to design an efficient organizational framework most suited to carrying out the BLM programs and include materials such as final recommendations, proposals, and staff evaluations. These files also contain administrative maps showing regional boundaries and headquarters of decentralized offices or that show the geographic extent or limits of the BLM programs and projects. Location: WO, Centers, SO, FO.	PERMANENT. Cutoff EOFY in which prepared. Transfer to FRC 5 years after cutoff. FRC transfers to NARA in 5-year blocks when most recent records are 10 years old (e.g., FRC transfers the 1990-94 block in 2005). NARA Job N1-49-90-3, 16/41a(1).
		(2) Organization, Reorganization, and Boundary Location Reference Copies. Location: All.	TEMPORARY. Destroy when superseded, obsolete or no longer needed for reference. NARA Job NC1-49-85-2, 16/13b.

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Item	Record Series Description			Disposition Authority
	b.	BLM Histories.		
		(1)	History Project Case Files. Narrative BLM histories including oral history projects prepared by BLM the historians or public affairs officers or by private historians under contract to the BLM. Some background materials, such as interviews with past and present personnel, generated during the research stage may also be selected for permanent retention. Exception: copies of the BLM documents made for convenient reference. Location: WO, Centers, SO, FO.	PERMANENT. Cutoff EOFY in which project is completed. Transfer paper records to FRC 5 years after cutoff. FRC transfers to NARA in 5-year blocks when most recent records are 10 years old (e.g., FRC transfers the 1990-94 block in 2005). Transfer audio and videotapes directly to NARA when 10 years old. NARA Job N1-49-90-3, 16/41c(1).
		(2)	History Documents - Reference Copies. Location: All.	TEMPORARY. Destroy when superseded, obsolete or no longer needed for reference. NARA Job NC1-49-85-2, 16/13b.
19	ADMINISTRATIVE AND MANAGEMENT IMPROVEMENT PLAN, SURVEY, STUDY, AND PROJECT CASE FILES. Case files documenting cost reduction, personnel utilization, and other management improvement projects. May include inventories of personnel, forms, or administrative files, workload studies, position management evaluations, administrative task force files, reports and files of other administrative non-committee work groups. Includes management team minutes and reports, safety plans, volunteer action plans. Authority: 235 DM 3. Confidentiality: Non-public record category 3. Location: All. Exclusions: Program evaluations, audits and reviews (Schedule 22/2), organizational studies (Schedule 16/18a), ADP 5-year procurement plans (Schedule 5/12), electronic system documentation (Schedule 20/11), records of streamlining teams and other teams established to review processes and procedures (Schedule 22/2), reference copies of administrative and management improvement plans/surveys/studies/projects (Schedule 23/21).			TEMPORARY. Cutoff EOFY in which plan, survey, study, or project is implemented or completed. Transfer to FRC 3 years after cutoff. FRC destroys 7 years after cutoff. NARA Job NC1-49-85-2, 16/5.
20	PROGRAM POLICY, DIRECTION, AND DECISION CASE FILES. Case files, arranged by program activity name, containing documentation of major policy and other decisions that are not documented in a mission-related directives case file (Schedule 16/1b(2)). These files provide a complete history of the major events, approvals, changes in program direction, and other important actions. May contain documents described in Schedule 16/1b(2)). Authority: 44 USC 3101; 36 CFR 1220.30. Confidentiality: Non-public record category 3. Location: WO, Centers, SO. Exclusions: WO Budget Office policy files (Schedule 5/11).			PERMANENT. Cutoff EOFY or if accumulation is limited, cutoff every 5 years. Transfer to FRC 10 years after cutoff. FRC transfers to NARA 30 years after cutoff. NARA Job NC1-49-94-2, 16/43.
21-25	Reserved			

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Item	Record Series Description	Disposition Authority
26	ELECTRONIC MAIL AND WORD PROCESSING SYSTEM COPIES. Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate a recordkeeping copy of the records covered by the other items in this schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.	
	a. Copies that have No Further Administrative Value. After the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.	TEMPORARY. Destroy/Delete within 180 days after the recordkeeping copy has been produced. GRS 16/15a.
	b. Copies Used for Dissemination, Revision, or Updating. That are maintained in addition to the recordkeeping copy.	TEMPORARY. Destroy/Delete when dissemination, revision, or updating is completed. GRS 16/15b.

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